

Please note that the layout of the checklist is still under progress. When the layout is done, we will also provide a link to the website where the checklist is available for downloading. However, in order to start the review process by the policy learning platform experts the checklist is attached in a work-in-progress format.

Checklist for online and hybrid innovation processes

Introduction

- This checklist is aimed at people planning or leading development and innovation processes, which are implemented fully or partly online. It includes key aspects to consider before, during and after the work itself, forming the basis for a successful result.
- The checklist primarily covers key aspects for online or hybrid development and innovation processes. If needed, general project planning guides and/or remote working guides can also be used as support.
- The list was compiled on the basis of interviews. The interviewees were leading various development and innovation processes during the Covid-19 pandemic (2020–2021). The interview data was supplemented with observations from co-creation and digitalisation research.
- The checklist is divided into three parts: before, during and after the work, and into five different categories: goals/results, process, tools, participation/creativity/communication and facilitation/process leadership.
- We recommend that you go through the entire checklist when you start the planning and come back to it whenever needed. Not all aspects are applicable to all processes, but it is good to consider them anyway.

Key concepts

- Process: Activity taking place over a certain period of time including different work phases and steps, meetings/workshops and (possibly) independent work between these.
- Events: Single, time-bound arrangements, which are part of a process or independent, where people gather to co-create.
- Co-creation: Developing ideas and solutions as a collaboration between a number of people (with different backgrounds). The participants have either been invited or they have signed up for the collaboration themselves.
- Hybrid events and processes: Arrangements including participants attending onsite and remotely. Processes including parts with onsite attendance and parts with remote attendance.
- Tools: Digital solutions used to carry out meetings and various specific work phases online and/or in hybrid form.
- Facilitation: Leading and running single events in practice.
- Process leadership: Responsibility for planning and carrying out an entire process, process ownership.

Checklists

- Before
- During
- After
- Competences and external expertise

- Tools

1 Before

Consider these aspects when you plan an online/hybrid process or event. Go through this list when you start the planning and come back to it, whenever needed.

Goals and results

Have a clear vision of what you want to achieve.

Define your target group(s) and plan how to reach them.

Familiarise yourself with your target group's conditions for participation and design the process accordingly.

Make sure that all phases and steps of the process are actually relevant for the final result and for the target groups.

Process

Reserve enough time for planning and think through the entire process – which entity, which parts? If you clarify this for yourself, it is easier to explain it to others as well.

Make a budget/list of needs and make sure you have the necessary resources.

Think about the format of the events - workshop, information session, co-creation, brainstorming, etc. and plan the arrangements accordingly.

Do you need prerecorded inserts? Give clear instructions on how to produce them.

Provide background material and ask the participants to prepare in advance.

Tools

Clarify the team tasks and division of work – facilitation, technical support, chat moderation, other possible needs. Is there a need for backup?

Make sure that the selected tools are suitable for the planned activity, that you and the participants have the right to use them and that are easy to use.

Choose the tools you trust according to the needs and make sure that you master the selected tools.

Ask the participants to familiarise themselves with the tools/software beforehand.

Involve external experts at points where you recognise that this is needed.

Participation/creativity/communication

Make a detailed plan/script for the process and for the single events.

Communicate the goal clearly to all participants and make it clear who leads the process and why it is carried out.

Invest time in planning how you can create a sense of belonging within the group.

Make sure to have an inspiring facilitator. Involve an external expert, if you don't want to or can't do the work yourself.

Create a nice visual world for the process, if possible.

Facilitation and process leadership

Practice your own communication skills and the ability to meet different people.

Create a clear division of responsibilities. If there is a larger organizational team, make sure to plan and work out common principles in advance.

Keep up to date with legislation and other rules and principles affecting the work (e.g. GDPR, funders' requirements, rules of different organisations).

Trust your (and your organisation's) excellence.

Make sure to have a plan B, if it doesn't work out as planned.

2 During

Keep these aspects in mind when you carry out a process or a single event online/in hybrid form. Note that some points refer to a longer process and some points to a single event.

Goals and results

Start and end each event by reviewing goals, achieved results and upcoming activities.

Process

Create a "dramaturgy" – a balance between the parts of an entity.

Empower participants to influence the process. Create points to check the needs of the participants.

Evaluate the work continuously during the process.

Adjust the process, if you feel it doesn't work or if you get feedback that it doesn't.

Set a schedule for each event and stick to it during the event.

Be systematic and make sure to document the work on the way. Give the participants access to the documentation during the process.

Tools

Choose tools which are stimulating creativity.

Minimise the number of tools used. However, make sure these tools meet the needs. Don't make changes unnecessarily, but switch if something doesn't work.

Ask everyone to activate the cameras if they can. Remember to mute the microphones when needed.

Check team tasks and division of work - facilitation, technical support, chat moderation, etc.

Participation/creativity/communication

Try to create a community spirit between the participants. Maintain regular contact with the participants between the events.

Think about fun ways to stimulate participation. Take advantage of the competences and skills of the participants and give room for creativity.

Establish quick and easy communication channels, if needed, and agree on practices.

Create space for collegial learning and exchange of experience.

Give space for small talk both at the beginning and end of each event.

Moderate the event clearly and be clear about how participants should interact and give feedback.

Facilitation and process leadership

Be brave. Dare to fail and learn from it.

Consider the dynamics between participants and give room for different people and their skills. Recognise the individuals in the processes and encourage an open and honest dialogue.

Make sure to have fun.

Pay attention to all participants also in hybrid meetings/events. Remember that hybrid events require double moderators and technical know-how.

Be prepared for surprises, conflicts, the need to rethink or copy with the situation - be responsive.

3 After

Check these aspects when the process has been completed or the event has been arranged.

Goals and results

Make sure to take the results of the process further – in all necessary forms and forums.

Process

Remember to evaluate the process and the tools, not only the results. Also consider the organisational learning and tacit knowledge transfers.

Tools

Make sure that you take up lessons learned regarding the technology and tools used. Check that the technology and tools are kept up to date for future needs.

Participation/creativity/communication

Communicate the final result clearly to all participants and to other stakeholders.

Check which target groups, channels, etc. are relevant and plan the communication accordingly.

Facilitation and process leadership

Take up lessons learned from the entire process and improve the identified aspects for the next implementation.

Summary

Take the time to go through the checklist point by point and note positive and negative experiences as well as insights and modification suggestions to be considered for the next process.

If you have done intermediate evaluations or otherwise noted something during a longer process, go through the documentation from the beginning to the end. Be as specific as possible, but allow yourself to do also more general reflections.

Successes

= positive experiences, lessons learned, things that went beyond expectations

Challenges

= negative experiences, things that didn't work out as planned or were planned in an inappropriate way

Insights

= key insights from planning, implementing and evaluating the process

Modifications

What should you do differently next time? What is the goal of the change?

Ability to change

What needs to be done or what needs to happen to bring about the change? Who is making sure that this will be done or will happen?

Competences and external expertise

When you start planning a process or event, it is important that you consider which competencies and work phases are needed. Check which of the identified competences exist or are missing in your own organization. Decide which external experts you need to involve. For this, the available time and budget are crucial. It is important to remember that the own staff members' time used also costs and that an unsuccessful process or event can get expensive in the long run.

Before

- Communication agency to select tools, set up and implement communication plans
- Strategy consultant to help with identifying the target group(s), process design etc.
- IT support
- Graphic designer/visual designer
- Production company for any pre-recorded inserts and planning of streaming

During

- Facilitator (can be combined with the choice of communication agency/production company)
- Inspirer to provide ideas and methods for the work or as an introduction to the topic
- Production company for streaming, documentation and possible editing of material
- Communication agency

After

- Consultant or researcher for evaluation of work

Tools

Purpose

Digital tools

Jointly prepare and share relevant material within e.g. the organizational team

Shared files and platforms, e.g. Teams, Google Drive

Arrange workshops and meetings online:

Video conferencing tools, e.g. Zoom, Teams, GoToMeeting

Support co-creation during workshops and online meetings:

"Whiteboard" tools, e.g. Miro, Mural, Jamboard or Padlet

Support and facilitate digital processes:

Platforms for facilitation, e.g. Howspace, Basecamp

Share information about activities and disseminate results more generally:

Home page, e.g. of a project or organization, and various social media channels, e.g. LinkedIn, Twitter, Facebook